

Calendly Scheduling Software Setup

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Instructions:

1. Overall Calendly account basic setup:

- Sign up for a [Calendly](#) — You must buy their **PRO plan**.
- Set your timezone, connect calendar, and set availability.
- Delete all the events they pre-populate in your account.

2. Strategy session call event setup:

- Create a “new event type”

What event is this?

- Name: Strategy Session
- Location: select “custom” & paste in your Zoom link
- Description: (optional)

When can people book this event?

- Date Range: Invitees can schedule 5 days into future
- Event Duration: 45 minutes
- Event Availability: Set to your own call schedule
- Time Before/After Event: Add 10 min after event

Additional Rules For Availability:

- Start Time Increments: 60 minutes
- Scheduling Conditions: 16 hours
- Time Zone Display: Automatic

Invitee Questions:

- Name:
- Email:
- Phone Number:
- Link to social media account:
- What's your current situation:
- What do you need our help with:
- Are you willing to invest in coaching if you feel it's what you need? (credit card, loans, PayPal credit):
- A meeting room link will be provided to you upon booking for you to join at the time of our call. - [radio button - Yes, I understand]
- It seems a bit silly to ask if you're going to show up... but are you going to show up for your call?

Workflows:

- Name: Email assignment
- When it happens: Immediately when new event is booked
- Do this: send email to invitee
- [Click here to get the email copy](#)

Notifications:

- Email reminders: ON
- Text reminders: ON

Confirmation Page:

- Redirect: Link to confirmation pages (clickfunnels)